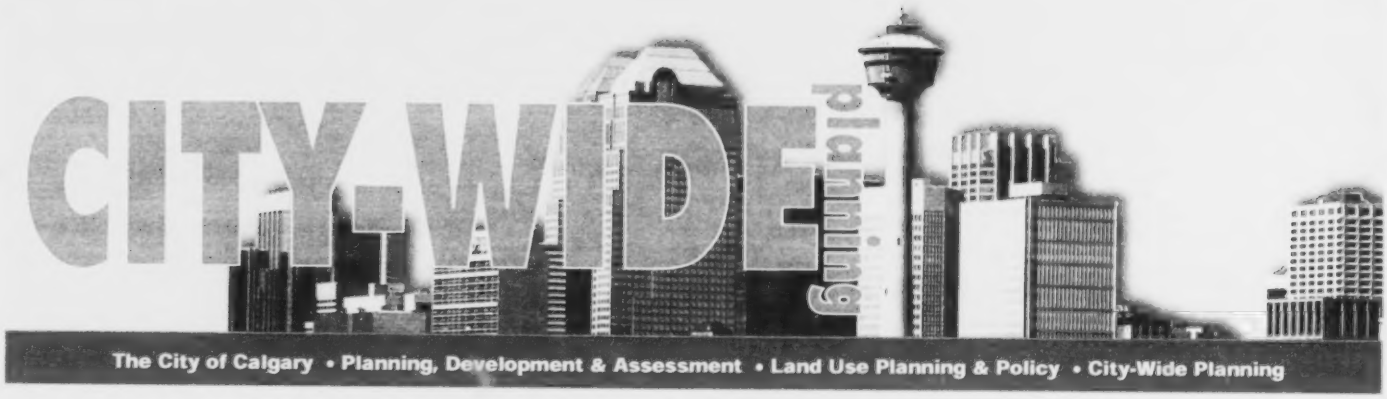


February 20, 2004

RE: City-Wide Information Package: January 2004 Update

Enclosed is the January 2004 update of the City-Wide Information Package. This publication from City-Wide Planning provides overviews of the various reports and activities that we undertake to assist Council and the Administration in accommodating growth and planning for change.

The briefing notes in this information package are updated and distributed as the information changes. The entire information package is updated annually. You will also be able to find the City-Wide Information Package on the City of Calgary's website at www.calgary.ca\planning\info.

We hope you find this information package helpful. We would be interested in any comments or suggestions that could help us make this package more useful to you. Please phone me at 268-8809 or email darrell.burgess@calgary.ca with your comments.

Yours truly,

Darrell Burgess
City-Wide Planning

BRIEFING NOTES

The briefing notes included in this Information Package provide both detailed information and general highlights on the various growth management activities in the City-Wide Planning Section of Land Use Planning and Policy. They will be updated on an ongoing basis, as the information changes. If you have any questions or comments, please contact us in City-Wide Planning.

Briefing Notes

Contacts

Population Growth & Change
Population Projections
Darrell Burgess 268-8809

Employment Growth & Change
Industrial Lands
Jim Francisco 268-5314

Housing & Land
Residential Density
Decker Shields 268-5489

Accommodating Growth & Change
(update scheduled for Spring 2004)
Rosemary Lawrence 268-5348

The Jobs/Housing Balance
Transit Oriented Development
(updates scheduled for Spring 2004)
Glen Radway 268-5928

Factors Influencing Growth
Carlie Henderson 268-5929

City Sectors

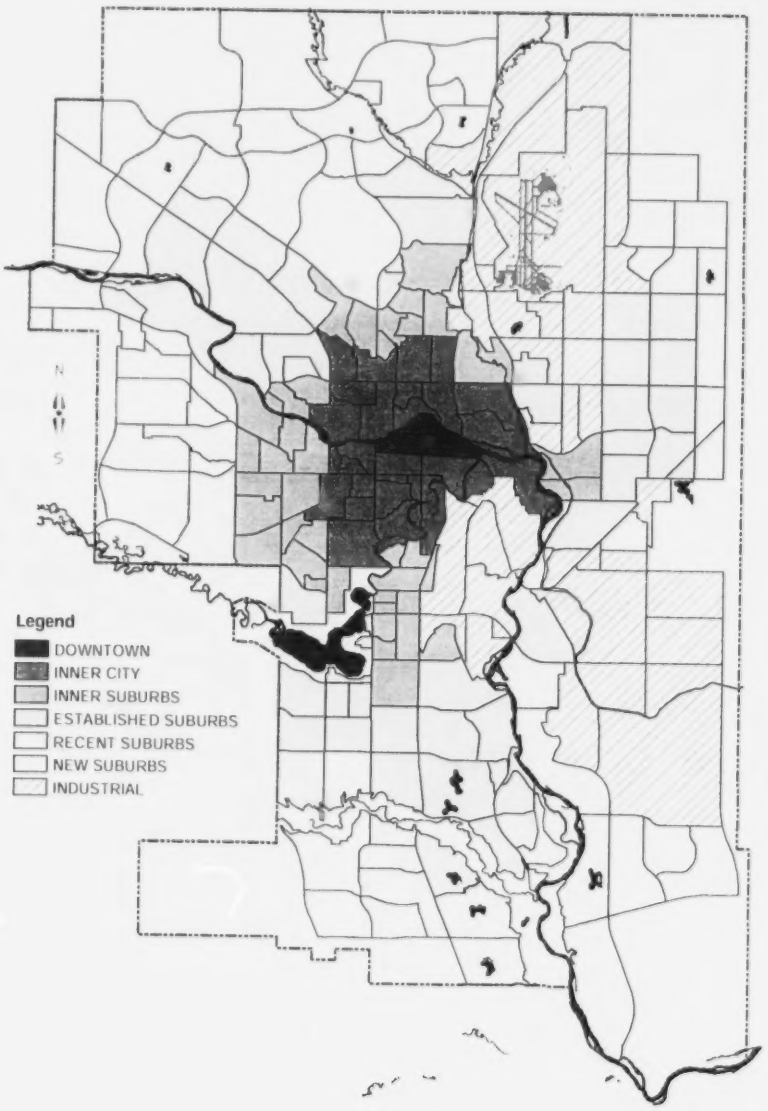
The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

The Briefing Notes in this package refer to various geographic areas of the city. This city sector map will help you relate the information to the different parts of the city.

URBAN STRUCTURE

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

The Briefing Notes in this package refer to various geographic areas of the city. This urban structure map will help you relate the information to the different parts of the city.



BRIEFING NOTE

104-04918/

POPULATION GROWTH & CHANGE

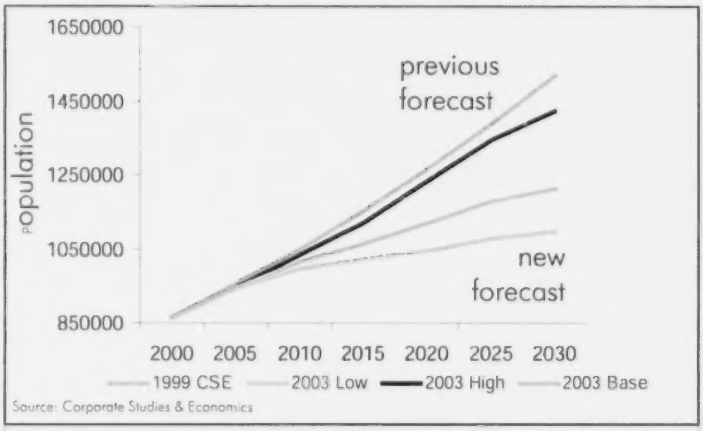
The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

Planning for future population and employment growth is a key component of city building. Long-term growth projections help us visualise the way the city will look and operate in the future, and help us to anticipate and plan future services. Because of the importance of these concerns, The City of Calgary has been involved in growth forecasts for decades. This briefing note discusses the projected population spatial distributions and how these forecasts help us manage future growth.

How much is Calgary Growing?

Calgary has experienced strong population growth lately. In contrast to this recent rapid expansion however, growth in the city is expected to slow down over the long term. The City's current long-term economic forecast (*Calgary's shifting socio-economic landscape: A long-term forecast of the economy and society 2003-2033*) presents a very different view of Calgary's long-term future than previous forecasts.

As shown in the chart, the new forecast (2003 base) starts to depart from the old forecast (1993 CSE) around 2010, and projects almost 300,000 fewer people by the time we reach 2030. This dramatic shift in the longer term is a result of several factors. Strong and sustained growth is no longer assumed to be a given due to significant economic constraints, including the increasing competition for labour as the population ages. The challenge for the future is no longer framed as "how do we keep up with growth?", but rather **"how do we make sure that our continuing growth is healthy and sustainable"?**



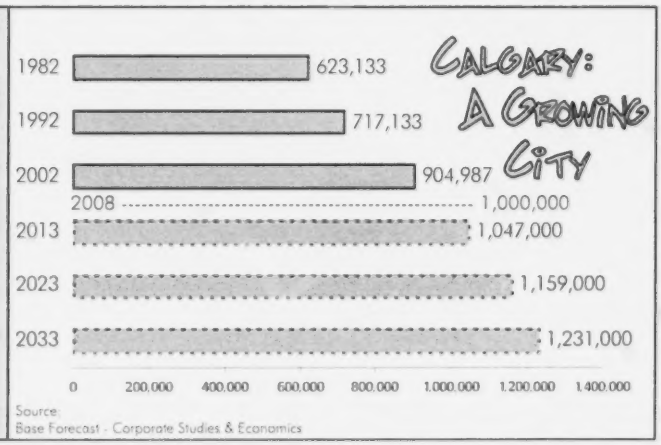
The dynamics of population growth and change have a strong impact on our urban environment, affecting the demand for land and public services, the quality of life and environment, the cost of living, and the efficiency of the transportation system.

Population Where does Growth come from?

There are two components of population growth: **natural increase** and **net migration**. **Natural increase** is the difference between the number of births and deaths each year. Both fertility rates and death rates have been on the decline; fewer babies are being born and people are living longer. As a result of these trends, Calgary's natural population increase has dropped from about 9,000 people per year in1980 to around 8,400 in 2003, while the total population grew by almost 362,000 over the same period.

Net migration is the difference between the number of people moving to Calgary and the number of people leaving Calgary each year. Unlike natural increase, net migration is less predictable and is linked to Calgary's economic conditions, and national and international market forces. During the "boom and bust" years, migration to Calgary dropped from a net gain of about 23,000 in 1982 to a net loss of around 11,000 in 1983. Over the past five years from 1998 to 2003, net migration to Calgary has averaged around 13,000 people per year.

- **Over the previous 20 years, Calgary's population grew by around 302,000 going from 620,696 in 1983 to 922,315 in 2003.**
- **In the next 20 years, Calgary's population is expected to grow by about 237,000 reaching a projected 1,159,000 by 2023.**



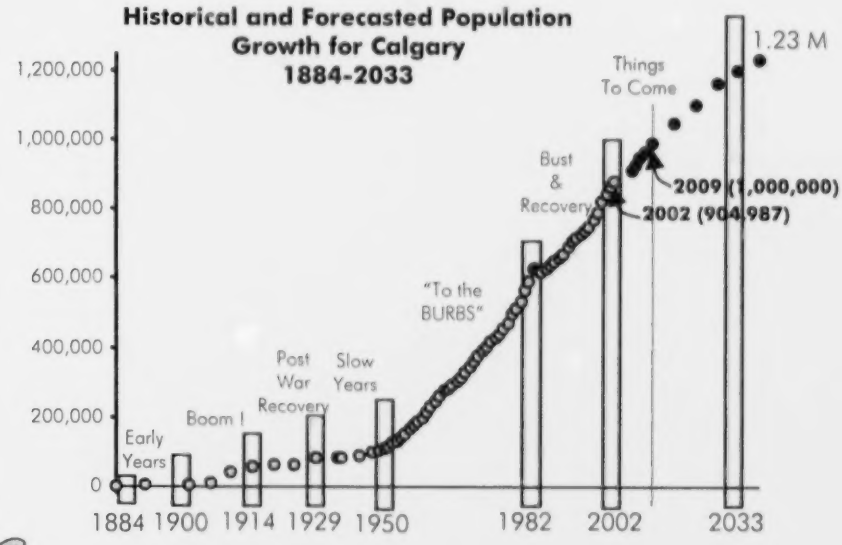
Calgary's Changing Demographics

Calgary has a younger population than most Canadian cities. But the population is aging and this has implications for services, mobility and housing. As the average age rises, the number of seniors (over 65) has increased both in numbers and as a proportion of the population. The number of seniors in Calgary rose from about 56,000 in 1991 representing 7.9% of the total population to around 79,000 in 2001 representing 8.9%. Current forecasts for Calgary suggest that the seniors population will grow to about 144,000 by 2022 representing 12.5% of the total expected population.

Family structure has also changed. Families are having fewer children, there are more single parent families, and more single person households. These changes have resulted in a greater demand for a wider variety of housing choice. The average number of persons per household in Calgary (the occupancy rate) dropped significantly from 3.4 in 1970 to 2.6 in 1990. The occupancy rate remained at 2.6 persons per household in 2003.

How Predictable is Calgary's Growth?

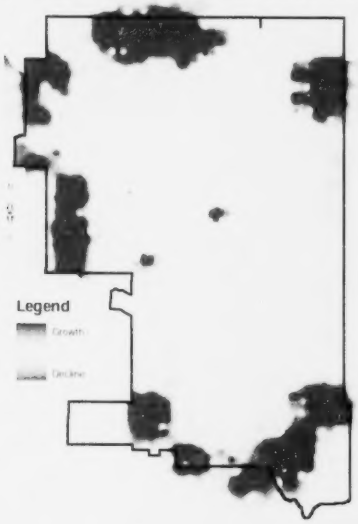
Historically, Calgary's population has increased steadily with a few ups and downs along the way. The most dramatic fluctuation occurred during the "boom and bust" years of the early 1980s when population growth peaked around 31,000 people per year. After 1982, Calgary's population actually declined for a few years before increasing again. Over the past five years, Calgary's population grew by almost 103,000 people from 819,334 in 1998 to 922,315 in 2003. Population growth for the period averaged 20,000 people per year, with a low of 15,770 (2001) and a high of 28,863 (1998).



Where is Growth Going?

The vast majority of Calgary's net population growth goes to the new developing communities. Over the last five years, new communities accommodated about 113,000 people representing 109% of total net population growth. The new developing suburbs are expected to continue to receive the lion's share of Calgary's net population growth for the foreseeable future.

Population Growth 2000 to 1.25 Million



Residential communities typically follow a lifecycle pattern that includes:

- Population growth for the first ten to twenty years as the community develops and builds out;
- A brief period of population stabilisation;
- Population declines as children grow up and leave home;
- Community redevelopment and rejuvenation with new generations of residents.

Calgary's inner city and downtown are gaining people once again after a period of population decline. In the last five years, the residential population grew by 5,500 people from about 124,400 in 1998 to around 129,900 in 2003. Over the next decade, projects such as East Village and The Bridges will continue to add population to the inner city neighbourhoods.

Calgary's established suburbs, which are located between the inner city and the newer suburbs, are now experiencing declining populations. Over the next few decades, these communities are expected to lose population, eventually stabilising around 90% of their peak population.

Need more information?

If you have any questions on the information contained in this Briefing Note, or would like additional information, please phone Darrell Burgess at 268-8809 or email darrell.burgess@.calgary.ca

BRIEFING NOTE

POPULATION PROJECTIONS

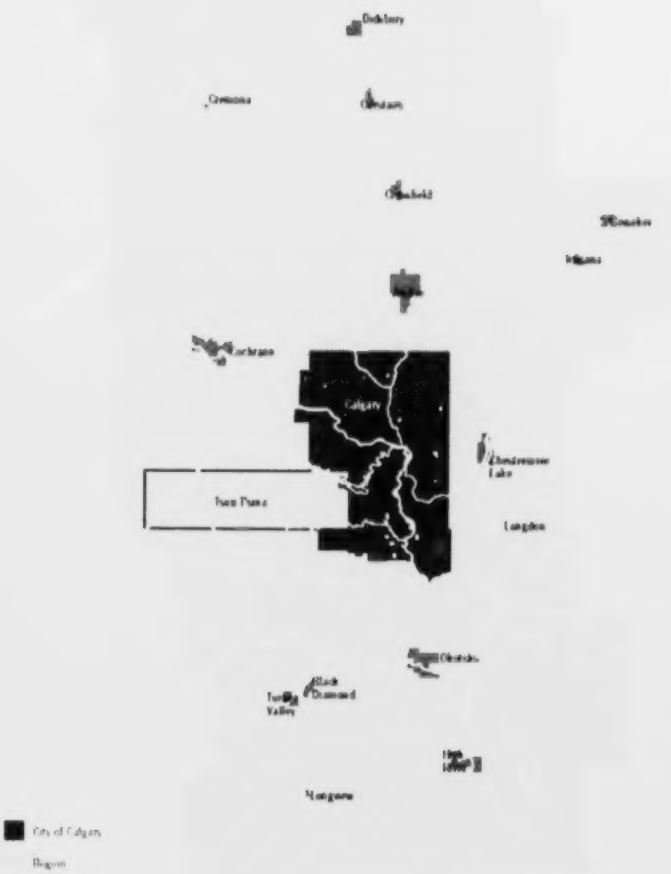
The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

The Long Range Forecast for Calgary

Trying to gauge something as complex and dynamic as population growth, is inherently difficult. The City of Calgary's long-range forecast of population growth is produced from the best information available at the time and is The City's best educated guess based on current trends and analysis by Corporate Studies & Economics (CSE). The purpose of this briefing note is to provide an overview of The City's current long-range population forecast, and to compare it with other long-range forecasts from leading sources.

The City of Calgary's population projections are derived from forecasts done for a much larger area called Census Division 6 (CD6). As shown on the map, CD6 includes Calgary and the surrounding region extending beyond Didsbury to the north and Longview to the south.

Census Division 6



The current City of Calgary projections consist of Low, Medium (or Base), and High estimates, all of which incorporate two key trends:

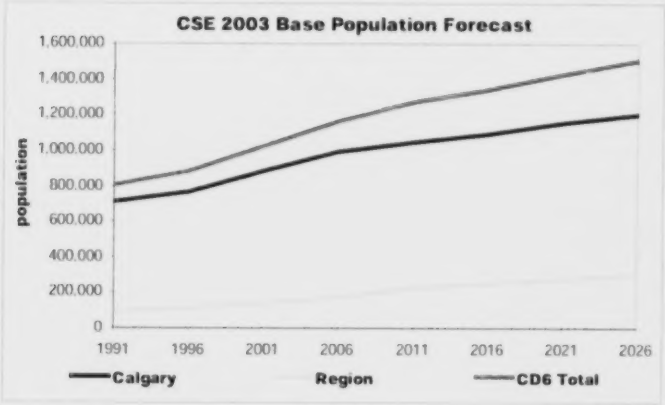
1. A declining long-term trend in employment growth due to labour shortages, consistent with other recent forecasts.
2. The assumption that the region outside of the city will continue to grow faster for most of the forecast period.

The City's forecast for CD6 (CSE 2003 Base) aligns closely with forecasts from both Statistics Canada (StatCan) and the Province of Alberta (AB Treasury), as shown below.

CD6 FORECAST COMPARISON

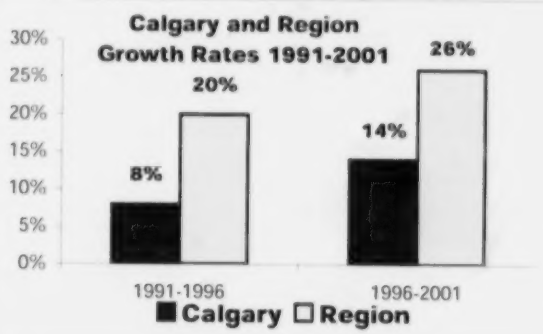
	CSE 2003 Base	StatCan	AB Treasury
1991	804,802	804,802	804,802
1996	880,859	880,859	880,859
2001	1,021,060	1,021,060	1,021,060
2006	1,166,000	1,146,702	1,190,995
2011	1,272,000	1,246,695	1,274,800
2016	1,345,000	1,338,161	1,332,385
2021	1,432,000	1,419,843	
2026	1,505,000	1,489,841	

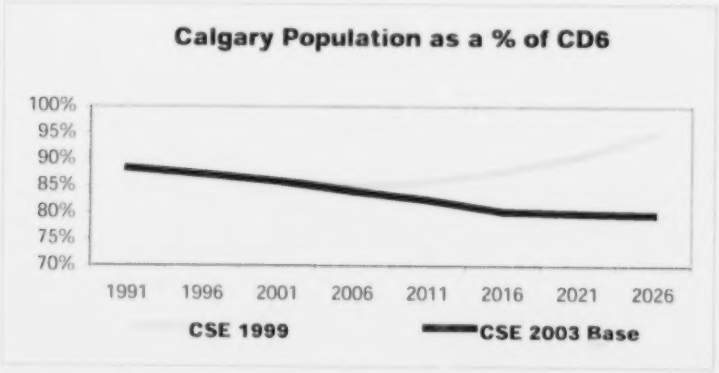
The City's current long-range forecast projects annual growth rates for Calgary of about 2% (or approximately 17,000 people/year) at the start. Annual growth then slows gradually to around 1% (roughly 11,000 people/ year) by 2026. The region surrounding Calgary grows about 5% annually (approximately 8000 people/year) at the start, then slows gradually to around 1% (roughly 4000 people/year) by 2026.



Discrepancies between forecasts can arise from different assumptions about the total population growth that goes to Calgary and the share that is allocated to the region.

The City's most recent forecast (CSE 2003 Base) includes a larger share of regional population growth than the previous forecast (CSE 1999). This change reflects updated figures that show the region grew by 51% (approximately 48,000 people) during the 1990s while Calgary's population grew by 24% (or about 168,000 people) in the same period. The population in the region outside Calgary grew at twice the rate of the city, so Calgary's share of the CD6 population dropped from 88% (in 1991) to 86% (in 2001). The City forecasts that Calgary's share of the CD6 population will continue to decline in the future, falling to just under 80% by 2026.





Why is the Region Growing Faster?

Population and employment growth over the forecast period will result in increased demand for land. At the same time, the price of residential and non-residential land in Calgary is expected to continue to rise relative to the rest of the region. This should continue to provide incentives for businesses and individuals wanting to locate in the region compared to the city. Consequently, the region outside of Calgary is expected to experience faster growth rates than the city for most of the forecast period.

Statistics Canada Forecasts

Population projections from Statistics Canada form the basis of many different forecasts and are referred to frequently by numerous organisations (e.g. The Canada West Foundation's recent *State of West 2003* report). Statistics Canada forecasts are widely accepted as the benchmark for population projections in Canada.

The most recent forecast series by Statistics Canada provides two commonly used projections for Alberta. Projection 2 (P2) is a medium growth scenario that forecasts a population of 3,589,500 in Alberta by 2026; it is considered the base projection by Statistics Canada. Projection 3 (P3) is a high-growth/high migration to Alberta and B.C. scenario that forecasts a provincial population of 4,050,700 by 2026.

P3 is based on an assumption of high fertility and natural increase that is difficult to defend given current demographic trends. The City of Calgary prefers Statistics Canada's MMHW projection, which uses the same high western migration assumption as P3, but replaces high fertility with medium fertility and natural increase. The MMHW (**M**edium fertility/**M**edium natural increase/**H**igh **W**estern migration) projection forecasts a population of 3,945,500 in Alberta by 2026 – about 100,000 less than P3. The City of Calgary's 2003 Base forecast tracks Statistics Canada's MMHW projection very closely.

Next Forecast Review

New population projections based on the 2001 federal census should be available from Statistics Canada sometime in 2004. CSE will refer to these new projections for the next review of The City of Calgary's long-term forecast, currently scheduled for 2006.

Need more information?

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For a copy of this document contact the Planning Information Centre located on the 4th floor of the Municipal Building at 268-5333 or find it on the City's website at www.calgary.ca/planning/info

References

Alberta Treasury (1999), *Alberta Population Projections by Census Divisions: 1999-2016.*
Statistics Canada (2001), *Population Projections for Canada, Provinces and Territories 2000-2026*, Catalogue 91-520.
The Canada West Foundation (2003), *State of West 2003.*
The City of Calgary (2003), *Calgary's shifting socio-economic landscape: A long-term forecast of the economy and society 2003-2033.*

BRIEFING NOTE

EMPLOYMENT GROWTH & CHANGE

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

Planning for future employment and population growth is a key component of city building. Long-term growth projections help us visualize the way the city will look and operate in the future, and to anticipate and plan future services. Because of the importance of these concerns, The City of Calgary has been involved in growth forecasts for decades. This Briefing Note discusses the forecasting process, the forecast results, and how these forecasts help us manage future growth.

Fast Facts

- **Over the previous 20 years, Calgary's , increasing from 348,400 in 1981 to 487,600 in 2001**
- **Over the next 20 years, Calgary , reaching 668,000 by 2023**
- **over the next 22 years, slightly higher than historic growth levels.**

Source: *2001Travel to Work Survey* (The City of Calgary), and *Calgary's shifting socio-economic landscape: A long-term forecast of the economy and society 2003 – 2033* (The City of Calgary, May 2003).

How do we forecast employment?

Corporate Studies and Economics initiates the process by developing city-wide employment projections, consisting of forecasts for 5, 10, 15, 20 and 30 years into the future. Major assumptions that affect future rates of land consumption are developed by City-Wide Planning and are based on estimates of future employment densities for retail, industrial and office uses.

City-wide Employment Major Assumptions

Land Supply — Land supply is estimated by determining the extent of vacant land using GIS tools and planning documents.

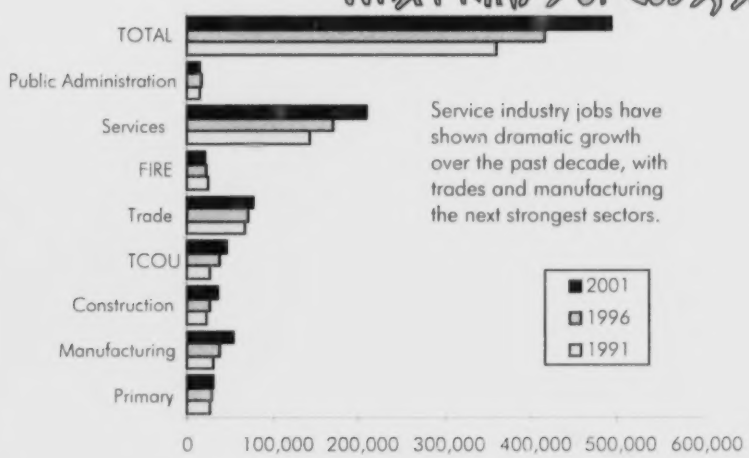
Land Demand — Using assumed average employment densities, the amount of land needed to accommodate employment growth in the future is estimated.

Distribution — Employment is allocated to sub-areas based on the proximity of vacant lands to areas currently undergoing development; the timing of required services and other infrastructure; and the accessibility of vacant lands to major roadways.

FORECASTING PROCESS

Forecasting employment is an iterative process that is repeated for every five-year period, out to the thirty-year time horizon.

WHAT KINDS OF JOBS, AND WHERE ARE THEY GOING?



Service industry jobs have shown dramatic growth over the past decade, with trades and manufacturing the next strongest sectors.

The location of jobs in Calgary has become more dispersed over the years. While the downtown still has the greatest concentration of employment at 22% (103,000 jobs), this has dropped from 26% in 1981. A growing proportion of jobs are locating in the light industrial areas in the northeast and southeast, as well as in retail-commercial zones that are located throughout the city.

Services (Professional and Business Services). TCOU (Transportation, Communication, Utilities). FIRE (Finance, Insurance, Real Estate).
Source - Corporate Studies and Economics.

Interpreting the Forecast

Although every forecast is made with the best available information, a forecast is still an 'educated guess'. It is particularly difficult to forecast for small geographic areas. The actions of developers and institutions are influenced by a host of market factors. This can lead to growth that is either faster or slower than anticipated, occurring in unanticipated locations, or at higher or lower employment densities than forecast. These facts underscore the **need to view any forecast as less a prediction of future events, and more a tool to assess the large-scale and long term impacts of growth.**

The forecast is also useful as a device to test various city-wide growth assumptions and scenarios. Should we grow north and south along the Airdrie-Okotoks corridor, or should we grow east-west? What are the impacts of major planned employment centres on the transportation network and other servicing requirements? A long range forecast is essential to address these kinds of questions.

Need more information?

If you have any questions on the information contained in this Briefing Note, or would like additional information, please phone Jim Francisco 268-5314 or email jim.francisco@calgary.ca

For a copy of this document contact the Planning Information Centre located on the 4th floor of the Municipal Building at 268-5333 or find it on the City's website at www.calgary.ca/planning/info

How the employment forecast is used

The forecast is used to develop long-range planning and infrastructure servicing plans for the City of Calgary. The Transportation Policy Section uses the land use forecasts as key inputs to the current EMME/2 transportation model. This model is used to forecast major infrastructure requirements and transportation network upgrades. The land use forecast, therefore, has a key role to play in major city-wide transportation system expenditures, as finalized in the Transportation Improvement Priority Process.

Various operational departments including Roads, Wastewater & Drainage, and Waterworks use the employment and population forecasts to identify where major system upgrades and expansions will be required and to ensure they are accounted for in budget forecasts.

Long-term forecasts are particularly important to land use planning for assessing whether the City of Calgary has sufficient inventories of vacant land for both residential and employment growth. Studies of land annexation depend on the long-term forecast to assess when and where additional land is required. Developers also use the results to simulate traffic impacts of proposed developments on the road network.

The Link between Location, Jobs & Transportation

Where jobs are located in the city directly affects the demands placed on transportation services. If most of the jobs are located downtown, then most commuters are travelling to and from the downtown core during morning and evening rush hours. On the other hand, if job locations are dispersed throughout the city and people are going to and from a variety of locations at different times, the demands placed on the road network and transit are more evenly spread out. In other words, job location directly affects rush hour traffic volumes, traffic patterns, the movement of goods throughout the city, and transit ridership and services.

The mix of industries and occupations makes a difference too. Calgary's economy - built on an economic base of energy, tourism and agriculture - is diversifying over time and this changing industry mix directly affects travel patterns. For example, the growing manufacturing and warehouse distribution sectors in Calgary tend to locate in the industrial corridors of the northeast and southeast. This tendency affects both traffic patterns and volumes, and transit use throughout the transportation network.

The strength of the economy also affects the City's transportation services. A strong economy, like Calgary is currently experiencing, attracts more people to the city in search of work, resulting in more people on the road and on the transit system.

Job Growth & Migration

As the business community grows, more people are needed to fill jobs. Jobs are filled from the existing population and from people who migrate to Calgary in search of work. The degree of variation in migration levels can be dramatic as people respond quickly to changes in the local economy. For example, in response to Calgary's recent strong economic growth, Calgary experienced a larger than usual influx of people to the city. Between 1997 and 2002, Calgary had an average net migration of about 15,000 people per year – almost four times higher than the average net migration of 4,000 people per year between 1990 and 1996. In 2003, net migration was around 9,000 people.

BRIEFING NOTE

INDUSTRIAL LANDS

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

The *Short-Term Growth Management Strategy – Industrial Information Update* (ISTGMS) provides a city-wide approach to land use planning for industrial development. Industrial development is fundamental to the city's economic growth, and the ISTGMS monitors supply and demand and aids in developing consistent policy for the development of industrial lands. The ISTGMS provides:

- a forecast of industrial growth (demand);
- a mapped inventory of industrial lands available to accommodate growth (supply); and,
- strategies to ensure that industrial lands are made available in a timely, logical and efficient manner.

OVERVIEW – SERVICED LAND SUPPLY

What are the main uses of Industrial Land in Calgary?

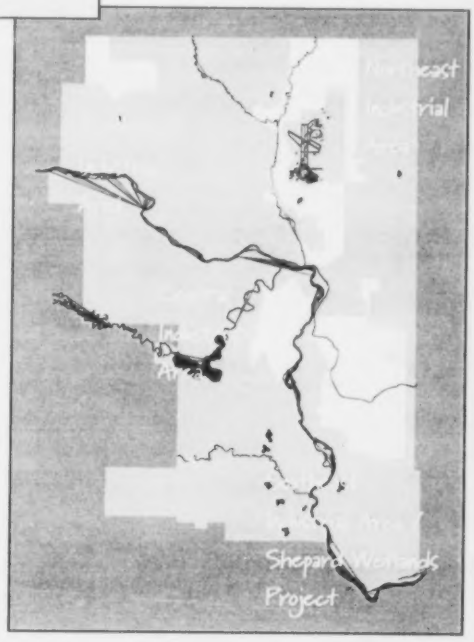
A forecast of industrial land demand by major industrial sector has been produced. Market demand for three industry groupings were identified:

- **Land Extensive Industries** (e.g. storage facilities and other similar uses which roughly correspond to I-3* and I-4* development),
- **General Light Industry** (I-2* development), and
- **Warehouse/ Distribution industries** (I-2* development).

Warehouse/Distribution demand constitutes the majority of industrial land demand for the foreseeable future.

*Industrial land use designations from the City of Calgary Land Use Bylaw.

There are roughly 1,955 hectares (4,831 acres) of serviced or potentially serviceable industrial land available in Calgary, excluding the Airport Industrial lands. Of this total, 747 hectares (1,846 acres) are fully serviced or readily serviceable and immediately available for development. Based on an anticipated annual demand of 120 hectares (300 acres) over the next three years, there is currently a 6.2 year supply of developable industrial land in the city.



SE Industrial Area

The Eastlake Industrial Park currently provides developable vacant industrial land. This supply should be sufficient to provide for industrial development in the southeast until completion of the Shepard Constructed Wetlands project (mid to late 2007). Without development of the Shepard Constructed Wetlands as outlined in the Southeast Industrial Area Structure Plan, land supply constraints will be faced within three to four years.

NE Industrial Area

With the extension of 96th Avenue and servicing north of the Airport, vacant land all the way to Country Hills Boulevard has been opened up for development. The northeast area will continue to attract high-tech manufacturing industry, general light industrial activity and industries that demand proximity to the Airport.

Central Industrial

Lands in the Central Industrial area have largely been developed. Extensive redevelopment of existing industrial uses in the short to medium term (5 to 10 years) to retail, office and residential uses is anticipated in this area. Central city location, LRT access, and the growing Macleod, Blackfoot and Barlow Trail commercial corridors will drive this redevelopment activity.

Future Industrial and Areas Under Policy Review

Lands suitable for future general light industrial uses have been identified in the northwest. Additional industrial areas may be identified through future planning studies.

Industrial Area	Vacant Industrial Land Inventory
North/Northeast	2,156 hectares
Southeast	1,562 hectares
Central	28 hectares
Northwest	289 hectares
Total	4,035 hectares

Land Extensive	40	hectares
General Light Industry	81	hectares
Warehouse/Distribution	182	hectares
Total	303	hectares

Strategy Update

The ISTGMS is updated annually. The latest report was completed in 2003. New long-term growth projections and supply/demand analysis studies will occur every three to five years (depending on the pace of change). A key feature of the process will be the convening of an Industrial Growth Panel. The Panel will consist of City of Calgary and industry representatives.

Two major strategies were identified in the ISTGMS. Both strategies target the need to retain sufficient lands within the city for industrial use.

Significant commercial development of industrial lands has occurred throughout Calgary's industrial areas. Although few developable parcels of land are designated for commercial uses, a significant (and growing) number of parcels are being developed for commercial purposes. The broad range of uses allowed on I-2 lands, the generally lower land values captured for industrial land, and the lack of a commercial land development strategy, among other factors, contribute to this growing trend.

Industrial lands that do not require servicing, also known as lands designated for 'I-4 Limited Service Industrial Uses', are identified in the ISTGMS. Areas where these uses are predominant include the Saddleridge Industrial Area in the Northeast and the Section 22/23 areas in the Southeast. Typically, these uses include outside storage facilities (e.g. equipment storage, truck-trailer storage) and other similar land uses which, were expected to convert over time to more intense land uses. However the transition to more intensive industrial land uses has been slow, raising the concern that valued industrial land is underutilized. As well, the predominance of uses that do not require servicing (which is paid for by landowners) delays upgrading of these areas.

The ISTGMS provides an overview of Industrial land supply and forecast demand similar to the overview of residential land supply provided in the *Short-Term Growth Management Strategy - Residential Information Update 2003-2007*.

The ISTGMS also provides an overview of current and proposed changes to industrial land development policy. The market supply/demand studies, the land inventory and the policy analysis sections of the report are required to ensure the efficient and timely development of available industrial lands.

Need more information?

For a copy of the report, the ***Short-Term Growth Management Strategy - Industrial Information Update 2003-2007****, contact the Planning Information Centre located on the 4th floor of the Municipal Building at 268-5333 or find it on the City's website at www.calgary.ca/planning/info*

If you have any questions on the information contained in this Briefing Note, please phone Jim Francisco at 268-5314 or email jim.francisco@calgary.ca

Total Vacant Industrial Land Supply
(Serviced and Unserviced)

Industrial Area	Vacant Industrial Land Inventory
North/Northeast	2,156 hectares
Southeast	1,562 hectares
Central	28 hectares
Northwest	289 hectares
Total	4,035 hectares

Anticipated Demand for Industrial Land
2003 to 2007

Land Extensive	40	hectares
General Light Industry	81	hectares
Warehouse/Distribution	182	hectares
Total	303	hectares

Strategy Update

The ISTGMS is updated annually. The latest report was completed in 2003. New long-term growth projections and supply/demand analysis studies will occur every three to five years (depending on the pace of change). A key feature of the process will be the convening of an Industrial Growth Panel. The Panel will consist of City of Calgary and industry representatives.

Major Strategies

Two major strategies were identified in the ISTGMS. Both strategies target the need to retain sufficient lands within the city for industrial use.

1. Commercial Absorption of Industrial Land

Significant commercial development of industrial lands has occurred throughout Calgary's industrial areas. Although few developable parcels of land are designated for commercial uses, a significant (and growing) number of parcels are being developed for commercial purposes. The broad range of uses allowed on I-2 lands, the generally lower land values captured for industrial land, and the lack of a commercial land development strategy, among other factors, contribute to this growing trend.

2. Less Intensive Industrial Uses

Industrial lands that do not require servicing, also known as lands designated for 'I-4 Limited Service Industrial Uses', are identified in the ISTGMS. Areas where these uses are predominant include the Saddleridge Industrial Area in the Northeast and the Section 22/23 areas in the Southeast. Typically, these uses include outside storage facilities (e.g. equipment storage, truck-trailer storage) and other similar land uses which, were expected to convert over time to more intense land uses. However the transition to more intensive industrial land uses has been slow, raising the concern that valued industrial land is underutilized. As well, the predominance of uses that do not require servicing (which is paid for by landowners) delays upgrading of these areas.

Summary

The ISTGMS provides an overview of Industrial land supply and forecast demand similar to the overview of residential land supply provided in the *Short-Term Growth Management Strategy - Residential Information Update 2003-2007*.

The ISTGMS also provides an overview of current and proposed changes to industrial land development policy. The market supply/demand studies, the land inventory and the policy analysis sections of the report are required to ensure the efficient and timely development of available industrial lands.

Need more information?

*For a copy of the report, the **Short-Term Growth Management Strategy - Industrial Information Update 2003-2007**, contact the Planning Information Centre located on the 4th floor of the Municipal Building at 268-5333 or find it on the City's website at www.calgary.ca/planning/info*

If you have any questions on the information contained in this Briefing Note, please phone Jim Francisco at 268-5314 or email jim.francisco@calgary.ca

BRIEFING NOTE

HOUSING & LAND

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

A key objective of The City of Calgary is to avoid premature extension of municipal infrastructure in new growth areas, while making every effort to support a competitive, efficient land development process. One of the tools to help achieve this goal is the annual *Short-Term Growth Management Strategy - Residential Information Update* (RSTGMS). The purpose of the RSTGMS is to determine, in advance, where and when The City will need to provide water, sanitary and storm sewers to accommodate residential growth in the suburbs. The RSTGMS provides:

- information on residential subdivision and development activity in each sector of the city;
- an inventory of the existing land supply;
- forecasts of the demand for housing and land in each sector over the next five years;
- an assessment of the "fit" between the existing supply of land and expected demand; and
- recommendations on the location and timing of service extensions.

Who uses the RSTGMS?

The RSTGMS is used by City of Calgary Business Units to prepare their five-year capital budgets, as well as by a host of groups outside the City that need to know where growth is going, such as developers, land appraisers, service providers, the general public and many others.

Tracking Residential Development Activity

Included in the RSTGMS is an inventory of existing residential land supply and future residential land capacity. The land inventory is maintained by monitoring new growth areas each year, and comparing current counts of vacant lands and developed lots to the previous year. Tentative Plans, Outline Plans, and Community Plans are reviewed to establish a detailed catalogue of opportunities and constraints to residential growth. This information, in conjunction with annual civic census data and the existing land supply, allows us to assemble a picture of future residential land capacity.

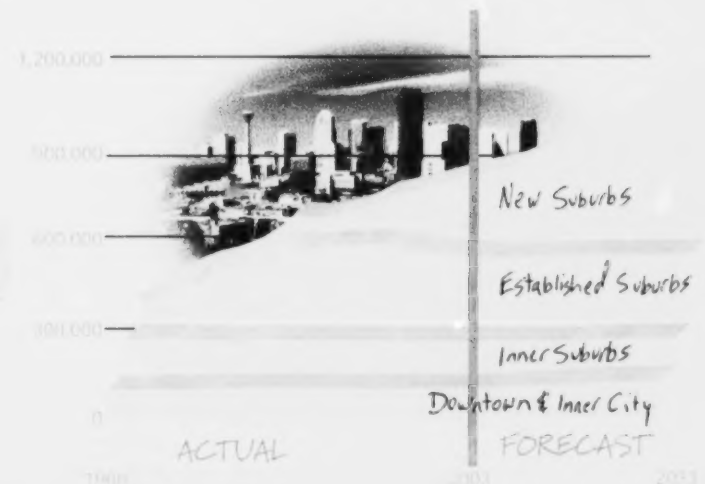
Did you know . . .

A couple of generations ago, single person households only made up about 15% of all households. Today, roughly 30% of all households are single person households.

Recent Residential Development Trends

Significant residential redevelopment has occurred in the established communities, inner city communities and the downtown over the past five years. The inner city and downtown have seen a strong increase in multi-family development as well as the replacement of older single-family homes with new infill housing. This type of development generally attracts single and two-person households, so even though strong redevelopment in the older areas of the city has occurred, population increase has been less dramatic.

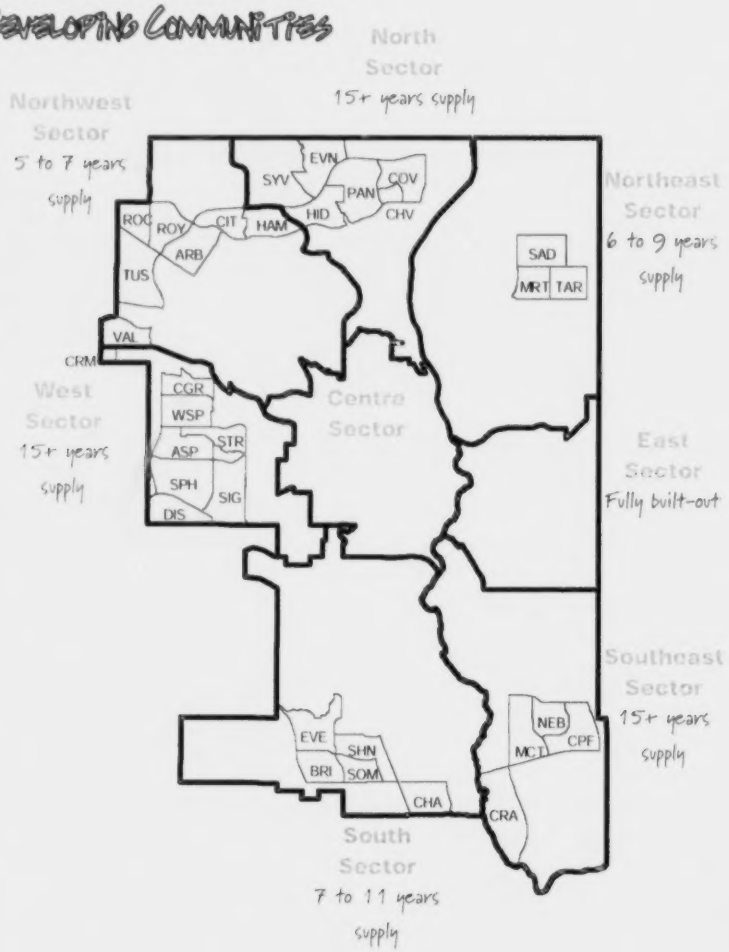
In contrast to the declining occupancy rates of established areas in Calgary, new suburbs are the location of choice for families with kids and offers the residential supply needed to accommodate Calgary's significant growth. The majority of Calgary's residential growth occurs in the new suburbs, which accounted for 109% of the city's total population growth over the last five years. New suburbs also accounted for almost 43% of all new multi-family development and 92% of all new single-family homes during the same period. Growth in the north half of the city was about 44%, in the south half about 27%, the west sector and centre sectors had 14% and 15% of the total unit growth (see sector map on following page).



Land Inventory of Developing Communities

Within the City's developing communities, there is a total planned land supply of 12 to 15 years - this includes a 6 to 8 year supply of land with municipal infrastructure and services in place.

Estimated Build-out of Developing Communities



Currently developing communities (shown on the map in gray) represent a relatively healthy supply of planned residential lands in most areas of the city. At the current rates of growth in each sector, communities in the north sector have over 15 years to build-out, while developing communities in the northeast sectors have 6 to 9 years to build-out. The east sector is essentially built-out with no further plans currently in place, while the developing communities in the southeast and west sectors are projected to take over 15 years to build-out. The developing communities in the south sector will likely build out in 7 to 11 years.

The strongest growth sector in the city has traditionally been the northwest sector, which is expected to build out in 5 to 7 years.

It is important to note that these projected inventories change from year to year due to shifts in economic activity and population growth, as well as changing trends in housing demand. It is expected that some areas may develop faster or slower than anticipated. In addition, the inventory of residential land is constantly changing as new communities are opened for development.

Anticipating Growth in the Suburbs

Over the next five years 2003-2007, the population of Calgary is projected to increase by approximately 16,800 people per year (see map on the inside cover of the Information Package). The developing communities are expected to accommodate at least 100% of this total population growth. For the same five-year period, about 9,400 new housing units per year are projected for Calgary, which include about 6,200 single-family and 3,200 multi-family units per year. Approximately 75% of total housing units are expected to be built in the developing communities (up to 5,700 single-family and up to 1,300 multi-family units per year). At these levels the developing communities would account for almost 92% of all new single-family construction and 43% of all new multi-family construction projected for Calgary over the next five years.

Need more information?

For a copy of the report, the ***Short-Term Growth Management Strategy - Residential Information Update 2003-2007,*** *contact the Planning Information Centre located on the 4th floor of the Municipal Building at 268-5333 or find it on the City's website at www.calgary.ca/planning/info*

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BRIEFING NOTE

RESIDENTIAL DENSITY

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

The Calgary Plan outlines objectives for the city that focus on efficient and environmentally responsible growth. One objective is to utilize land more efficiently by increasing housing density (the number of houses in an area) throughout the city through "infilling" and other types of intensification in established areas, as well designing new communities to accommodate higher densities. Higher densities can be achieved by building homes on smaller lots, by building attached homes (semi-detached, rowhouses or townhouses) or by building multi-family structures (apartment buildings). The City is working in conjunction with the development and homebuilding industries to capitalize on opportunities to further increase land efficiencies in the design of new suburbs. Innovation will continue to be encouraged in order to find the best solutions that balance the demands of the marketplace with the public costs of operating and maintaining public infrastructure and services. This Briefing Note discusses how a community's residential density is calculated, how this density has been changing over the past 30 years, and why a movement toward higher densities is a critical factor in maintaining a high quality of life as Calgary continues to grow.

What's Happening with Density?

The trend in housing density has been moving upwards.

- Residential densities ranged from [illegible] 15 units per hectare (4.5 to 6.0 units per acre) for many communities built during the 70's to early 90's.
- Since the latter part of the 1990's, plans have been approved at an average density of 15 to 18 units per hectare (6.0 to 7.2 units per acre).

The Calgary Plan requires that all new communities achieve 15 to 20 units per hectare (6 to 8 units per acre)

How is community residential density calculated?

Density = # of units ÷ Gross Residential Area

Sample Density Calculation

A sample community with 259 hectares (640 acres) of total land area, 37 hectares (91 acres) of non-developable lands, 43 hectares (106 acres) of regional land uses and 3,029 dwelling units would result in a housing density of 17 units per hectare (7 units per acre).

GROSS TOTAL AREA (total land area of community)	259	hectares
Less: NON-DEVELOPABLE LANDS	37	hectares
Equals: GROSS DEVELOPABLE AREA	222	hectares
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Less: REGIONAL LAND USES	43	hectares
Equals: GROSS RESIDENTIAL AREA	179	hectares
Number of Dwelling Units	3,029	units
Divided by GROSS RESIDENTIAL AREA	179	hectares
Equals: **DENSITY**	17	UPH
or	7	UPA

Non-developable Lands include: *(figures for sample density calculation only)*

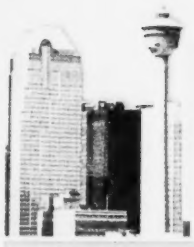
Environmental Reserve	20	
Railways	4	
Expressways, TUC, ROW's	8	
Other	5	
	37	hectares

Regional Land Uses include:

Senior High School Sites	6	
Major Commercial Centres>7 acres	11	
Regional Open Space	8	
Industrial	3	
Lakes	5	
Major Institutional Site(s)	6	
Other Regional Uses	4	
	43	hectares

Gross Residential Area includes:

Single Family Residential	93	
Multi-Family Residential	4	
Local Commercial	5	
Elementary & Jr. High Schools & Sites	7	
Local Open Space	18	
Wet/Dry Ponds & Public Utility Lots	1	
Church Sites	1	
Daycare Centres/Community Halls	1	
Small Indoor Recreation Site(s)	1	
Small Site Fire and Police Stations	1	
Local Roads & Lanes	47	
	179	hectares



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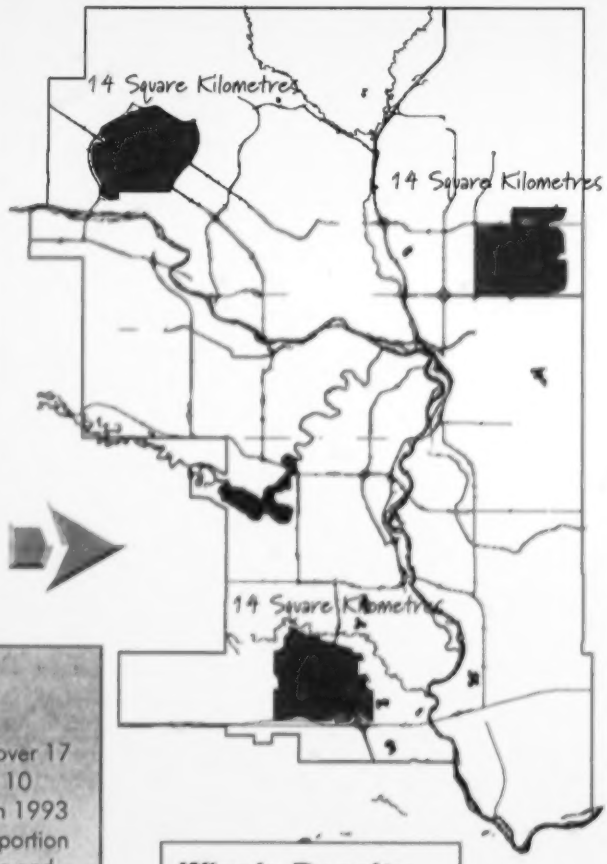
Density makes a big difference!

The density achieved in new communities influences the rate at which the city expands on its edges. Higher housing densities use up less land. In fact, if we accommodated the next 20 years of growth, roughly 250,000 people, in communities with housing densities of 17 units per hectare (7 units per acre) rather than 13.5 units per hectare (5.5 units per acre), we would use up to 14 square kilometers LESS land. This is land that would otherwise need water, sewer, storm and transportation, in addition to a host of other services such as Police, Fire and Emergency Medical Services.

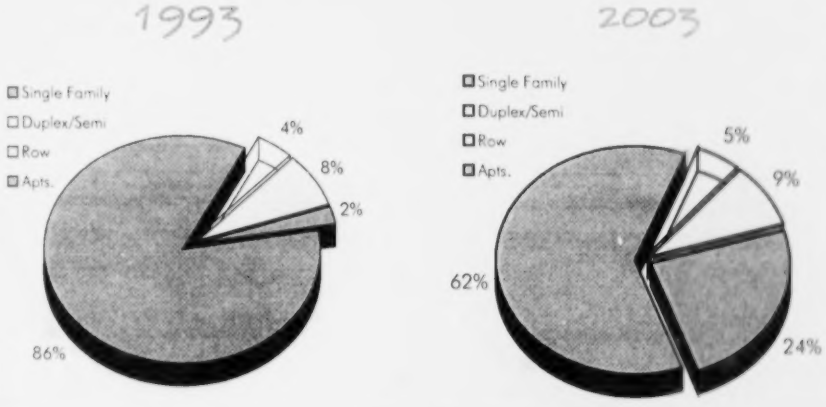
So what does 14 square kilometres look like?



Calgary's residential densities are going in the right direction

Average suburban densities in Calgary have increased from about 13.5 to over 17 units per hectare (5.5 units per acre to over 7.0 units per acre) over the last 10 years. Increasing density is reflected in the change in housing mix. Between 1993 and 2003, the proportion of single family housing decreased, while the proportion of multi-family housing has increased significantly. Changing demographics and economics are resulting in a greater demand for more diversity in housing choices throughout the city.

Calgary's Housing Starts 1993 and 2003



Why is Density Important?

We need to pay attention to community residential density because, as development progresses, more roads, pipes, wires, etc., must be built and maintained; and higher per capita operating costs are incurred for distance-sensitive services such as transit, police, fire, ambulance, garbage collection, snow removal, etc.

Need more information?

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BRIEFING NOTE

(Next update: Spring 2004)

ACCOMMODATING GROWTH & CHANGE

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • October 2002

This Briefing Note highlights information in the document *Accommodating Growth: A Framework for Coordinating Municipal Capital Investment* (the Framework). The Framework is a tool to be used by both the Administration and Council to better coordinate municipal capital investment priorities in new growth areas and to make better informed decisions on how to effectively accommodate long-term growth.

Over 90 percent of new growth in Calgary is accommodated in the newly developing suburban areas. Over the past decade, the rate of growth has challenged the City's ability to pay for services. It is anticipated that Calgary will continue to experience strong population growth until well into the next decade. Council has a strategic objective of "providing a pre-planned and pre-budgeted inventory of easily serviceable residential land, ready for development, to support a healthy, competitive, suburban land market." To achieve this, the investment in servicing growth must be examined on a comprehensive basis. The Framework is intended to be a "living document" with the base information updated annually, reflecting the current approved capital budget and departmental business plans.

WHAT IS THE FRAMEWORK?

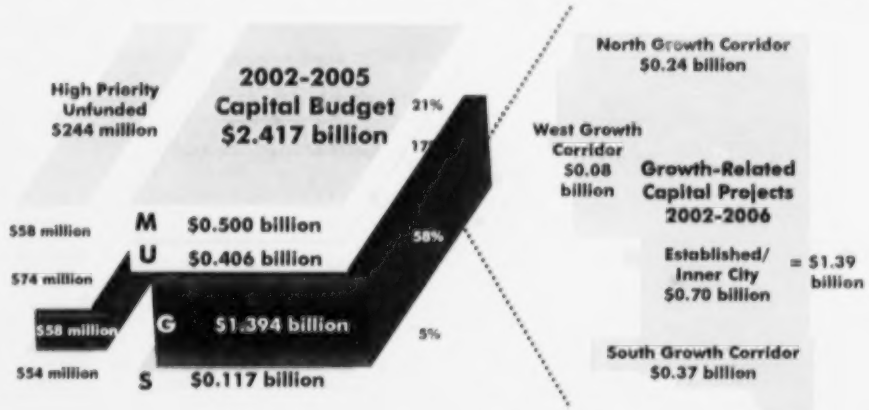
In the mid 1990's, with strong growth happening in the suburbs and the fiscal climate uncertain for municipalities, Council expressed the need for a better link between the long-term growth projections, planning policy, and the City's ability to deliver the infrastructure, services and facilities necessary to accommodate growth and development. The Framework builds on the approach taken in the Short-Term Growth Management Strategy which identifies the City's ability to deliver infrastructure (sanitary, storm and water) in the short-term (5 year horizon), and includes:

- A broader range of municipal projects (includes 14 areas of City operations)
- A longer time frame (beyond 5 years to 10 years, and farther if possible)
- The budget (timing and $) component for the municipal infrastructure and servicing
- A focus on the growth-related capital projects.

PART 1: Provides the long-term growth forecasts for the city, which take into consideration various factors, including existing policy plans, constraints and opportunities for development, and historical growth. Over the next 20 years, the population of Calgary is anticipated to grow by 250,000 people, with most of the growth (95% to 100%) occurring in the developing communities (refer to "Population Growth and Change" Briefing Note).

PART 2: Provides a general overview of the Capital Budget. Projects in the Capital Budget are identified by type – Maintenance (M), Upgrade (U), Growth (G) and New Service (S):

- 60% of the 2002-2006 Capital Budget is for growth-related capital projects ($1.39 billion)
- 50% of these growth-related capital projects are in the growth corridors ($0.69 billion)



Growth-Related Capital Projects 2002-2011

	2002-2006 ($billion)	2007-2011 ($billion)	Total ($billion)
North	$0.24	$0.15	$0.39
West	$0.08	$0.06	$0.14
South	$0.37	$0.16	$0.53
Established/ Inner City	$0.70	$0.32	$1.02
	$1.39	$0.69	$2.08

The density achieved in new communities influences the rate at which the city expands on its edges. Higher housing densities use up less land. In fact, if we accommodated the next 20 years of growth, roughly 250,000 people, in communities with housing densities of 17 units per hectare (7 units per acre) rather than 13.5 units per hectare (5.5 units per acre), we would use up to 14 square kilometers LESS land. This is land that would otherwise need water, sewer, storm and transportation, in addition to a host of other services such as Police, Fire and Emergency Medical Services.

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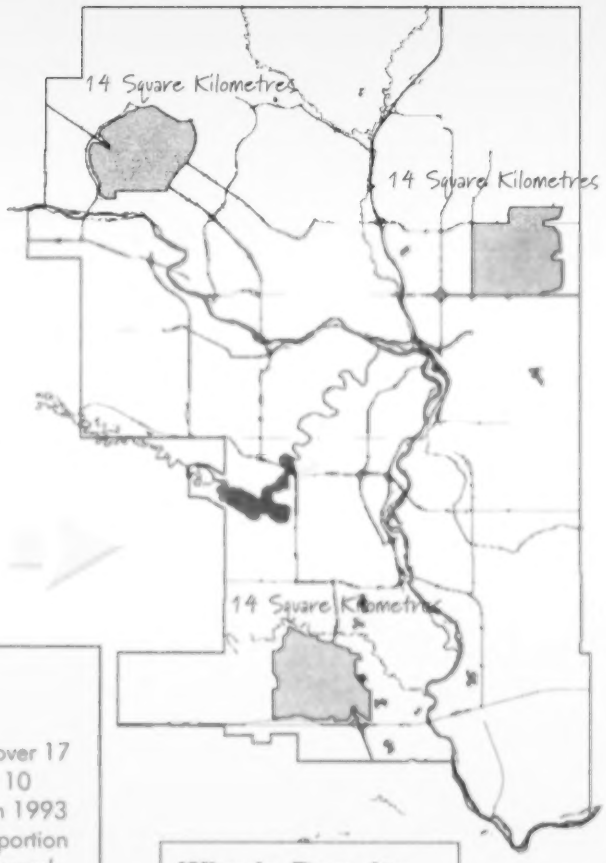

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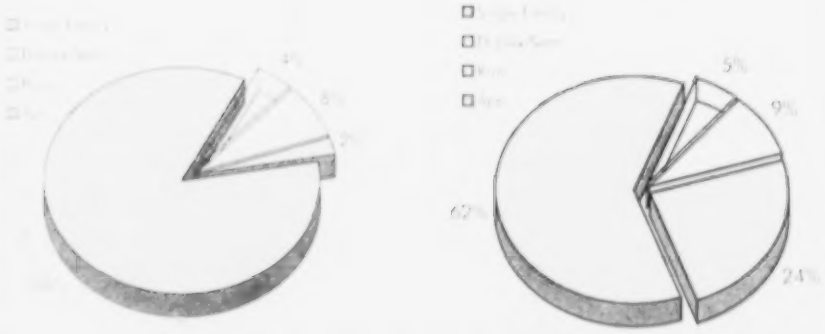

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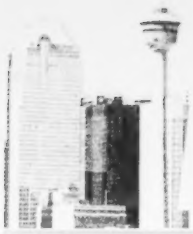

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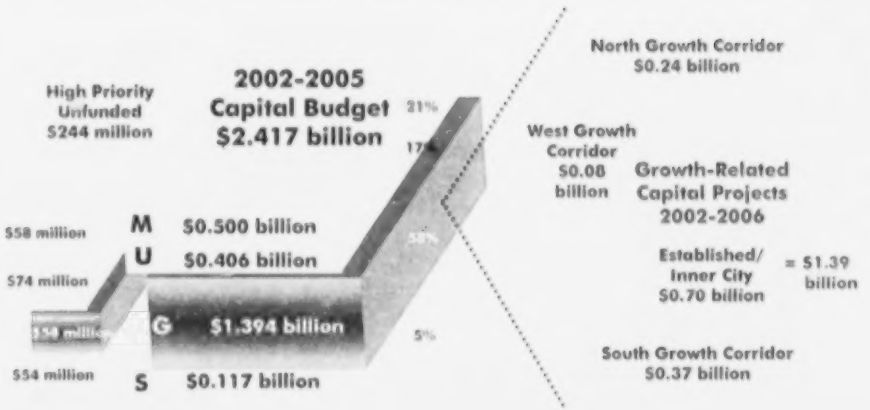
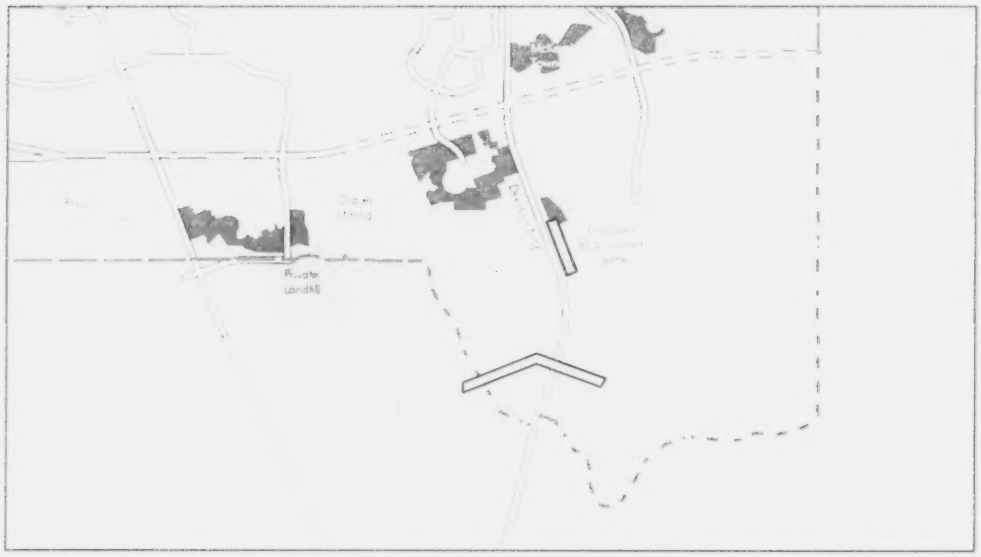


To better assess the "fit" between where we anticipate growth to occur over the next 20 years, and whether the City has aligned the necessary infrastructure and services to accommodate this growth, Parts 3 and 4 layer the growth-related capital projects over the growth projections out to 2021. For example, the map below shows all the growth-related capital projects, 2002-2011, for the Southeast Planning Area.

Southeast Planning Area

Growth-Related Capital Projects 2002-2011



Planning Area Boundary
Transportation/Utility Corridor

Growth-Related Capital Projects needed for new development in the Southeast Planning Area

	2002-2006 ($ Millions) Funded	2007-2011 ($ Millions)	TOTAL ($ Millions)
Waterworks:			
Cranston Feedermain Ph III	$ 2.489		$ 2.489
Wastewater:			
South Cranston Syphon		$ 5.000	5.000
Calgary Police Service:			
McKenzie/Cranston District Office*		1.750	1.750
Calgary Public Library:			
Southeast Library		6.725	6.725
TOTAL	$ 2.489	$ 13.475	$ 15.964

* Cross-budget for Facility between McKenzie and Southeast Planning Areas

Identifies where this information can be "plugged into" the existing decision making process to help make better informed decisions on:

- work programs identifying new planning areas;
- new policy plans; and,
- land use applications.

WHAT WILL IT DO FOR US?

Combined, the base information (Parts 1 to 4) and the Operational Framework (Part 5) provide the foundation for the Administration and City Council to:

- assess long-term needs for infrastructure and services within the city's growth corridors;
- identify the key capital projects needed to open up new areas;
- coordinate the delivery of capital projects in relation to the sequencing of policy planning and development in new areas;
- view the alignment of all capital projects on a city-wide basis;
- adjust the timing of capital projects to meet growth demands;
- better coordinate the provision of multiple services; and
- adjust budgets to allow for joint provision of services.

Need more information?

If you have any questions on the information contained in this Briefing Note, would like additional information, or would like a copy of the report, ***Accommodating Growth: A Framework for Coordinating Municipal Capital Investment****, please contact Rosemary Lawrence 268-5348 or email rosemary.lawrence@.calgary.ca*

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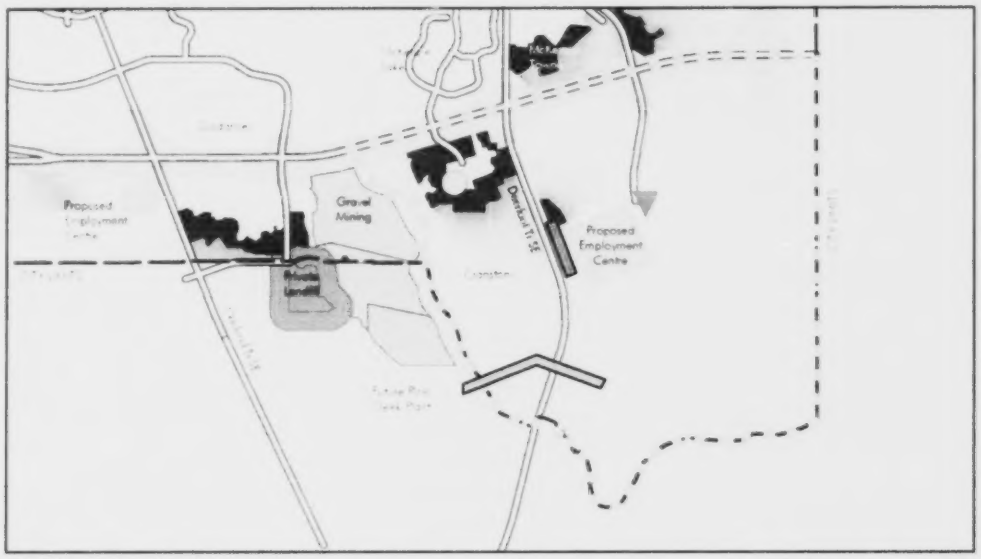
PARTS 3 and 4: To better assess the "fit" between where we anticipate growth to occur over the next 20 years, and whether the City has aligned the necessary infrastructure and services to accommodate this growth, Parts 3 and 4 layer the growth-related capital projects over the growth projections out to 2021. For example, the map below shows all the growth-related capital projects, 2002-2011, for the Southeast Planning Area.

Southeast Planning Area

Growth-Related Capital Projects 2002-2011



Planning Area Boundary
Transportation/Utility Corridor

Growth-Related Capital Projects needed for new development in the Southeast Planning Area	2002-2006 (in $ 000's) Funded	2002-2006 (in $ 000's) Without Funding	2007-2011 (in $ 000's)	TOTAL (in $ 000's)
Waterworks -				
Cranston Feedermain Ph III	$ 2,489			$ 2,489
Wastewater -				
South Cranston Syphon			$ 5,000	5,000
Calgary Police Service				
McKenzie/Cranston District Office*			1,750	1,750
Calgary Public Library				
Southeast Library			6,725	6,725
TOTAL	$ 2,489		$ 13,475	$ 15,964

*Capital budget split equally between McKenzie and Southeast Planning Areas

PART 5: Identifies where this information can be "plugged into" the existing decision making process to help make better informed decisions on:

- work programs identifying new planning areas;
- new policy plans; and,
- land use applications.

WHAT WILL IT DO FOR US?

Combined, the base information (Parts 1 to 4) and the Operational Framework (Part 5) provide the foundation for the Administration and City Council to:

- assess long-term needs for infrastructure and services within the city's growth corridors;
- identify the key capital projects needed to open up new areas;
- coordinate the delivery of capital projects in relation to the sequencing of policy planning and development in new areas;
- view the alignment of all capital projects on a city-wide basis;
- adjust the timing of capital projects to meet growth demands;
- better coordinate the provision of multiple services; and
- adjust budgets to allow for joint provision of services.

The FRAMEWORK is a TOOL to be used by Council and the Administration in coordinating capital investment priorities and making better informed decisions in Calgary's growth corridors

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BRIEFING NOTE

(Next update: Spring 2004)

THE JOBS/HOUSING BALANCE

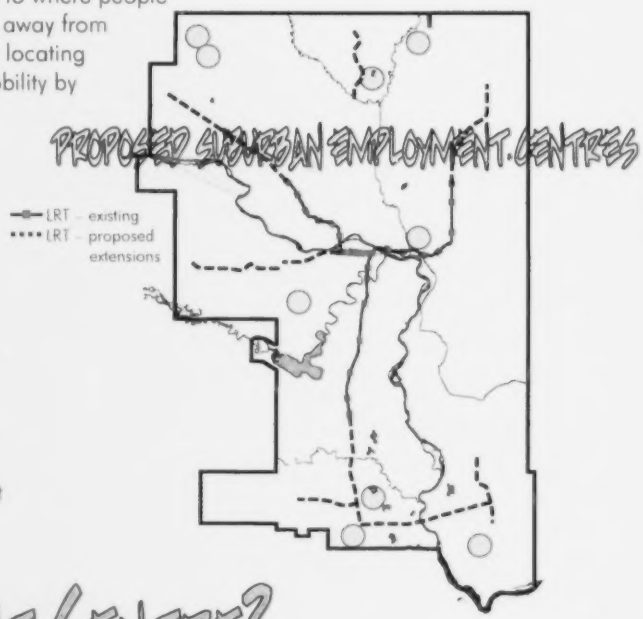
The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • October 2002

sound plans & wise investments

To help manage Calgary's continued strong economic and population growth, The City is encouraging the development of suburban employment centres. The location of jobs relative to where people live influences overall mobility on the transportation network, transit ridership, and quality of life.

The Employment Centre Strategy (ECS) is aimed at placing jobs closer to where people live. Key objectives of the Strategy are to divert some commuter traffic away from congested cross-town routes, and to better use the existing network by locating employment closer to newer residential areas. This benefits overall mobility by encouraging:

- More reverse flow on roadway infrastructure in the off peak direction with less demand in the peak direction
- Fewer vehicle kilometers and hours of travel resulting, in reduced vehicle emissions
- Less overall delay in the road network
- Less pressure for new river crossings.



Locations for potential employment centres have been chosen (shown on the map ◯) in places where a concentration of jobs would provide relief to the transportation network and optimize counterflow capacity. The Strategy recognizes that the market will be slow to build suburban office, clean manufacturing, institutional or research development in Employment Centre locations, and that initiatives must be balanced with maintaining a healthy Downtown.

SO WHAT IS AN EMPLOYMENT CENTRE?

In general, an Employment Centre would include:

- a cluster of primarily non-retail businesses or facilities located close to a suburban residential area or growth corridor;
- a mix of supporting uses, possibly including retail, multi-family housing, public facilities and amenities, such as park space or plazas; and
- good transit service and a pedestrian-friendly design.

Employment Centres will vary in physical form, density, mix of use and potential job concentrations.

Where we're at, and where we're going . . .

Making Employment Centres a reality requires a combination of good information, sound planning, wise investments and strategic partnerships. Highlights of progress achieved to date include:

Good information

A host of research and data gathering activities have been undertaken in the past few years including transportation modeling, market studies, literature research, trips to other cities to investigate employment centre development, consultants' advise on 'best practices', LRT information packages, etc.

Sound plans

Approval of the Sundance Place Business Park prepared in collaboration with Fluor Daniel.

Future plans include the South East Centre Concept Plan being prepared in collaboration with Carma, an amendment to the Stoney Industrial Area Structure Plan, preparation of an area structure plan for the South Macleod Trail lands, and preparation of an employment centre(s) land use district .

Wise investments

The City has acquired land for future Employment Centres - Aurora Business Park (west of Deerfoot Tr and north of Beddington Tr), lands adjacent to Stoney Trail in the vicinity of the Research and Development Park, and lands south of Spruce Meadows Trail and west of Macleod Trail.

Approval of the interchange for 50th Av SW and Crowchild Trail (CFB West).

Approval and construction of the pedestrian overpass connecting Sundance Business Park with the Shawnessey Town Centre, a Regional Recreation Centre and a new LRT station.

Partnerships

The City of Calgary collaborated with the Calgary Health Region and Carma in a land purchase that ensures the future hospital will locate within the South-East Centre.

City-owned lands that are intended for future employment centres could be developed through joint venture partnerships with the private sector.

The long term nature of the Strategy presents unique challenges to its implementation. For example, the real estate market responds most readily to immediate needs and demands and does not always accommodate long term community needs. Areas such as Crowfoot Centre and Shawnessey Town Centre which had been identified as employment centres have instead developed as retail commercial centres. Other challenges include the ability to accurately assess market demand, the potential for an oversupply of land for office development on the east side of the city, and traffic operations standards that may not adequately address the objective of concentrating jobs in suburban locations.

Keys to Success . . .

- Taking full advantage of redevelopment opportunities
- Having patience and taking proactive measures regarding greenfield sites
- Addressing implementation challenges
- Linking economic development with planning and infrastructure investment decisions
- Linking decisions together.

The Strategy will take many years to unfold fully. It will only happen through a commitment to making every decision and every action count. It requires that decisions about land use, public infrastructure investment, and The City's role in land ownership and development work in concert with one another. It also requires being ready and able to work with the private sector and other public agencies in a collaborative fashion – gaining better understanding of the market requirements for success, and being open to new approaches that would support the Strategy. The key challenge is to stick to the vision over the long haul.

Need more information?

If you have any questions on the information contained in this Briefing Note, or would like additional information, please contact Glen Radway at 268-5928 or email glen.radway@calgary.ca

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Sound Plans

The CFB West Master Plan (2000) calls for the development of a 41.3 ha (103 ac.) business park and will accommodate approximately 10,000 jobs.

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BRIEFING NOTE

FACTORS INFLUENCING DEVELOPMENT

The City of Calgary • Planning, Development & Assessment • Land Use Planning & Policy • City-Wide Planning • January 2004

Introduction

The location of development is influenced by existing and anticipated land uses, facilities, open space systems and natural habitat areas. The coloured map on the inside of the Information Package folder shows some of the factors that require special consideration when identifying new planning areas, and during the more detailed policy planning stage (community plans, area structure plans). This map is conceptual and the boundaries, exact locations, options for future use, and appropriate adjacent uses will be refined through more detailed planning processes.

Calgary International Airport / Noise Exposure Forecast

The airport lands, although owned by the Federal Government, are leased to the Calgary Airport Authority. Development in and around the Calgary International Airport is controlled by the Airport Vicinity Protection Act (AVPA). Through the AVPA, a Noise Exposure Forecast (NEF) zone has been established around the airport to protect different types of development from aircraft noise. The NEF zone surrounds the airport and restricts lands that fall within and above the 30 NEF contour from residential development.

Floodway/Floodplain Areas

Lands adjacent to rivers and creeks are subject to periodic flooding. Development on these lands is restricted through the *Land Use Bylaw* in order to reduce risk of property damage and possible loss of life. The *Bylaw* identifies floodways that have major restrictions on any form of development. The floodway is the river channel and adjoining lands that would provide the pathway for flood waters in the event of a flood of a magnitude likely to occur once in one hundred years. Special provisions for floodplains are also included in the *Bylaw* to reduce damage to development in these areas in the event of a flood. The floodplain consists of lands abutting the floodway that would be inundated by floodwaters of a magnitude likely to occur once in one hundred years.

Gravel Mining

The Province of Alberta, The City of Calgary, the Municipal District of Rocky View and the Municipal District of Foothills recognize the need to protect major aggregate deposits. There are a number of aggregate deposits within the city limits. The *Calgary Plan* encourages the protection of resource extraction through the early identification of areas where extraction should be the primary land use, and through development of appropriate measures to mitigate any safety or nuisance factors associated with resource retrieval.

Public Landfills, Wastewater Treatment Plants & Sludge Lagoon

The City of Calgary owns and operates three landfill sites, two wastewater treatment plants and one sludge lagoon in the city. There are also two privately owned landfill sites located within city limits. Specific regulations for landfill operations are set out in the *Municipal Government Act* (1995). The regulations do not permit schools, hospitals, food establishments or residential development within a 300 or 450 meter setback, depending on the activity and classification of the landfill. Landfills are long-term uses and redevelopment to other land uses is not expected within 50 years.

Calgary Correctional Facilities – Spyhill Jail

The Province of Alberta owns and operates four correctional facilities in northwest Calgary: the Bow River Correctional Centre; the Calgary Correctional Centre; the Calgary Young Offender Centre; and the Calgary Remand Centre. Issues relating to the integration of the facility with the encroaching residential development include: ensuring the safety of both inmates and residents in nearby communities; increasing traffic on the secondary roads around the facility which is affecting the transportation of inmates; and the provision of appropriate visual buffers to screen the facilities.

Sour Gas

There are a number of sour gas wells and pipelines within and adjacent to Calgary's boundary. These wells and pipelines are defined and controlled through the Alberta Energy and Utilities Board (AEUB) regulations and related safety setbacks. The City of Calgary has established additional setback requirements from wells and pipelines to address the nuisance factor, primarily related to well maintenance. The City has also established notification zones to ensure prospective homeowners are advised of sour gas well and pipeline locations, maintenance operations and activity. In accordance with Provincial regulations, once sour gas wells are depleted and capped all types of development may be allowed up to, but not on top of, the capped well head.

Steep Slopes

There are a number of areas in the city that have steep slopes or escarpments, mainly along the Fish Creek and Bow River Valleys, and along West Nose Creek. These slopes may be unstable and prone to erosion, landslides or subsidence, and may therefore be unsuitable for development. These escarpments provide an important component to Calgary's parks and open space system. Policies in the *Calgary Plan* relating to treatment of escarpments include:

- Preserve undeveloped major escarpments as natural open space features that enhance the environment; and
- Establish setback zones of 18 m (60 feet) from the top of an escarpment in any new development or redevelopment area.

Suburban Employment Concentrations

The City of Calgary's Jobs/Housing Balance Strategy is aimed at creating concentrations of employment in strategic locations throughout the city to make better use of the transportation system. Suburban employment concentrations will provide the opportunity for Calgarians to live closer to where they work and to better utilize the existing road network by increasing reverse flows in peak periods.

Transportation / Utility Corridor (TUC)

The Transportation / Utility Corridor is a corridor of land approximately one-half mile in width, established by the Province to eventually accommodate both a ring road around Calgary and utilities. Freeways are being planned or exist within this corridor to facilitate the quick and efficient movement of goods and resources within and through the region. These include Stoney Trail, Marquis of Lorne Trail, Spruce Meadows Trail and the proposed East Freeway.

Other Land Uses

Other existing uses influencing growth and development in the city include the Spruce Meadows Equestrian Facility in the south, country residential development in and adjacent to the northwest, west and south city boundaries, the Tsuu T'ina Nation to the west and Canada Olympic Park in the northwest. Special consideration shall be given to these areas when undertaking detailed policy planning.

Need more information?

If you have any questions on the information contained in this Briefing Note, or would like additional information, please phone Carlie Henderson 268-5929 or email carlie.henderson@calgary.ca

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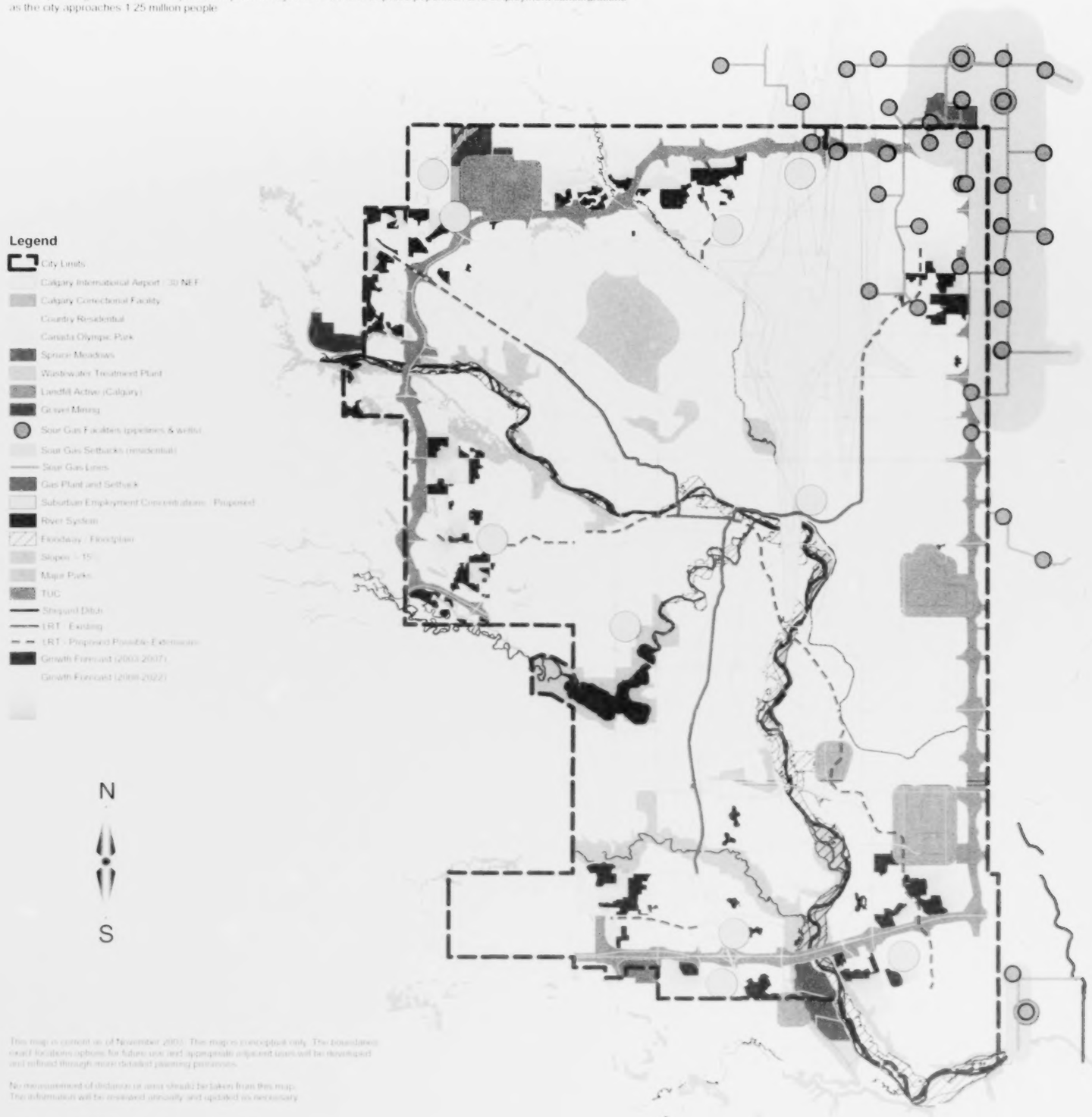
Calgary

Factors Influencing Growth & Development

Throughout the city there are various facilities, land uses and environmental conditions that influence where development occurs. The following map shows some of the main factors influencing development in Calgary, and where growth is anticipated to occur over the next 20 years.

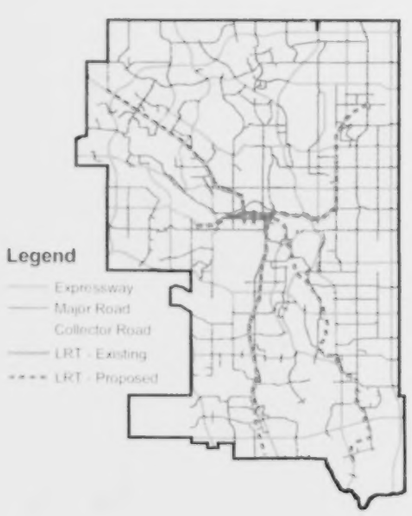
The maps along the bottom identify the transportation system and the anticipated population and employment concentrations as the city approaches 1.25 million people.



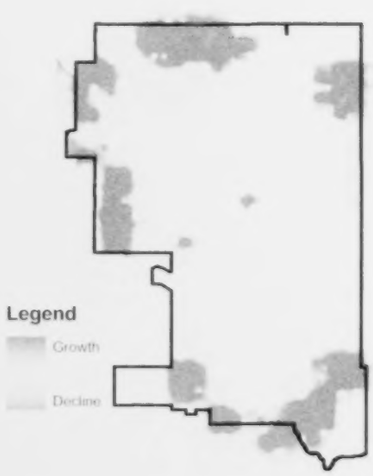
This map is current as of November 2003. This map is conceptual only. The boundaries/exact locations/options for future use and appropriate adjacent uses will be developed and refined through more detailed planning processes.

No measurement of distance or area should be taken from this map. The information will be reviewed annually and updated as necessary.

Transportation System

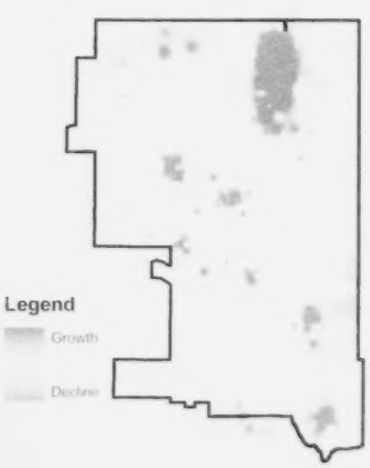


Population Growth 2003 to 1.25 million



(based on 2003 land use distribution)

Employment Growth 2003 to 1.25 million



(based on 2003 land use distribution)

City-Wide Planning Activities

Corporate Studies and Economics provides population and employment projections for the city as a whole. City-Wide Planning distributes these aggregate projections to various areas throughout the city. The population and employment distributions for five-year time horizons, out to thirty years, are used by the various Business Units at the City of Calgary for strategic planning and growth management purposes. They are a key input into the Regional Transportation Model and provide the base information for three documents produced by City-Wide Planning: the Short-Term Growth Management Strategies – Residential Update and the Industrial Update, and Accommodating Growth: A Framework for Coordinating Municipal Capital Investment.

Each year, an inventory of development activity is conducted by City-Wide Planning to determine where and how fast Calgary is growing. The existing supply of residential land is compared to the anticipated demand over the next five years. This information, provided in the RSTGMS and updated on an annual basis, helps build a picture of future growth in the city. In addition to identifying the fit between residential land supply and demand over the short-term, the RSTGMS also identifies infrastructure needs over the five-year period as a result of this growth. The intent of the RSTGMS is to ensure that a sufficient supply of readily developable land is available in a variety of locations, to facilitate competitive land and housing markets, while avoiding premature municipal investment in infrastructure.

The ISTGMS provides a comprehensive picture of anticipated industrial growth (demand), and an inventory of industrial land available to accommodate that growth (supply). It also provides a strategy to ensure that The City of Calgary, as a landowner, can respond to the industrial marketplace in the short-term through the timely, logical, and efficient provision of land.

The Framework identifies the long-term infrastructure and servicing needs and the municipal capital investment in growth required over the next 20 years. It provides a information base for decision-making; establishes an operational framework to undertake growth-related capital investment analysis; and provides a forum to align growth-related projects with the coordinated provision of services. The Accommodating Growth & Change Briefing Note is updated in Spring when the City's annual budget is finalised.

The main goal of the Jobs/Housing Balance Strategy is to concentrate suburban employment in mixed-use centres and along strategic growth corridors. The development of employment centres is a long-term initiative aimed at improving overall mobility and quality of life for Calgarians by distributing more employment across the city, bringing jobs closer to where people live, and reducing traffic congestion. The Jobs/Housing Balance Briefing Note will be updated in Spring 2004 following anticipated policy revisions.

City-Wide Planning is currently developing Transit Oriented Development policy guidelines to facilitate transit supportive development around existing and future LRT stations. Approval for the policy guidelines is anticipated in 2004, after which a Briefing Note will be prepared.

The various activities undertaken in City-Wide Planning support the goals outlined in The Calgary Plan. Specific activities that will further implement the goals of The Calgary Plan, as well as monitor our success in attaining these goals, are currently being developed.

WELCOME to the City-Wide Planning Information Package. This information package provides an overview set of Briefing Notes on the activities undertaken in City-Wide Planning that assist the City in accommodating growth and adapting to change.

In this information package, you will find information related to:

- How much employment and population growth we anticipate over the next 20 years, and where we expect this growth to occur
- Where future residential and industrial development will locate in the city, and how much land we have left to accommodate this growth
- How we calculate residential density and why it is important
- What infrastructure and services we need to accommodate growth over the next 20 years, and how it is budgeted
- Various land uses that influence how the city will develop.

The goals of the City-Wide Planning Information Package are to:

- Provide a concise overview of the growth management activities currently underway in City-Wide Planning
- Provide current information on growth in Calgary. Briefing Notes will be updated on an ongoing basis as the information changes
- Communicate what we're learning about how Calgary is growing and changing.